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Wealthtech Weekly

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By Rob Burgess
Reporter

The T3 Conference in Dallas has been in full swing this week. As usual, one of the highlights has been the annual T3/Inside Information Software Survey. Reflecting the rapid shift in the industry, it includes categories relating specifically to AI for the first time.

Are you also here? Let me know what you've been most interested in so far — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

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TOP STORIES

TECHNOLOGY

AI adoption surging in wealth management, T3 survey shows

For the first time, the T3/Inside Information Software Survey included categories for alternative platforms, generative language AI, search AI and graphics AI.

- **Wealth firms should rescue client experience from the margins, experts urge**
  Software to help advisors better communicate should be more than an afterthought for firms who want to grow organically, industry leaders said at T3.
- **Using tech to help clients through divorce: Show Me Your Stack**
  Craig Robson, founding principal and managing director of Regent Peak Wealth Advisors in Atlanta, is a Certified Divorce Financial Analyst

committed to helping clients through this difficult life transition.

- **CFP Board addresses AI risk with new ethics guide**
  The nonprofit's checklist aims to help advisors effectively use the technology in their firms and emphasizes confidentiality, privacy, integrity, legality and providing accurate information.
- **Advisors are getting more comfortable with AI, with exceptions**
  A recent Advisor360° survey showed that the vast majority of respondents enjoyed immediate benefits from using generative AI tools.

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